

National **Charter School** **Resource** Center



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at LEARNING POINT ASSOCIATES

Construction Planning and Management:

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Director of School Services
IFF

June 2010



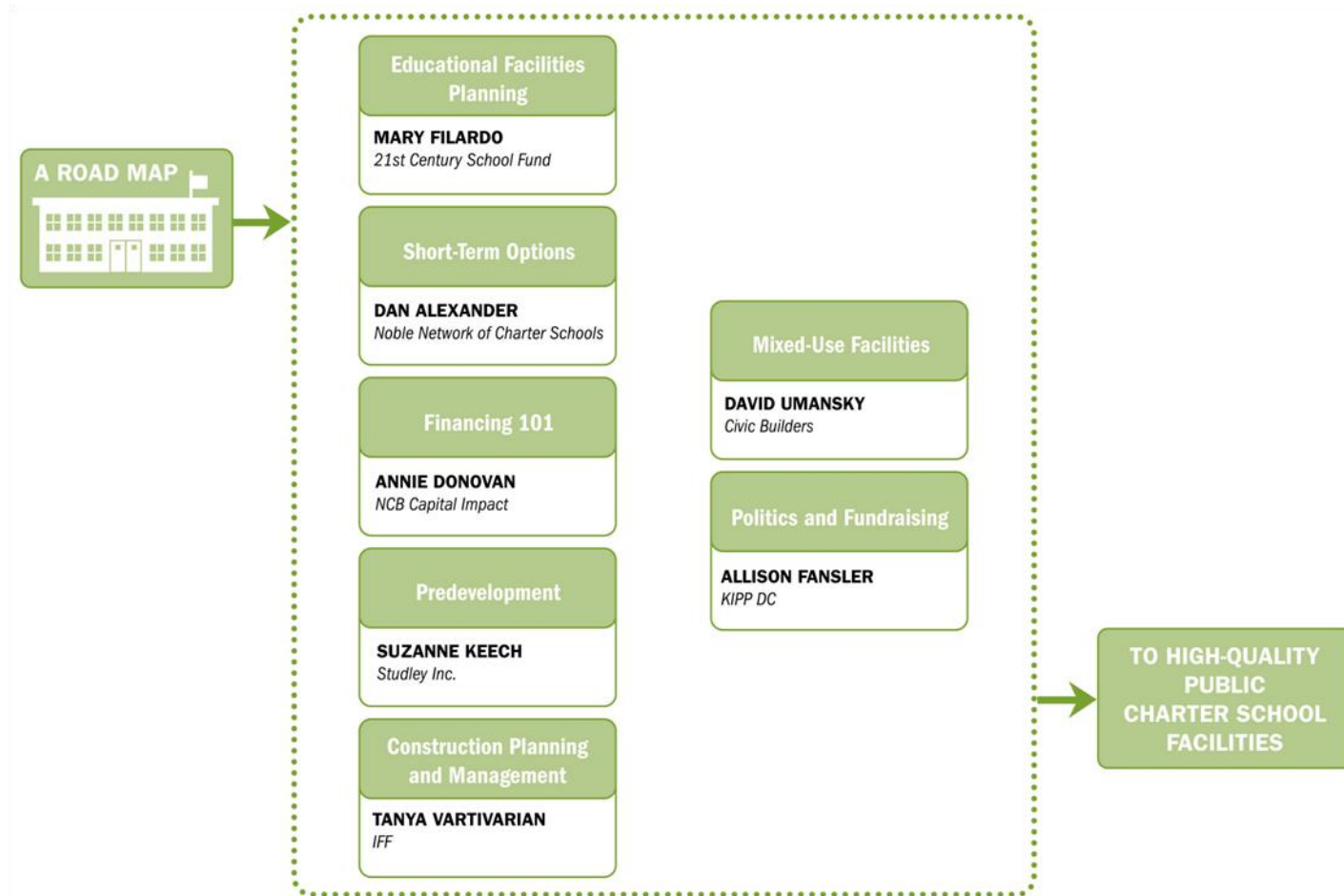
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Facilities Process Overview



About IFF

- A nonprofit community development financial institution founded in 1988, with more than \$165 million in assets
 - Serves Illinois, Indiana, Iowa, Missouri, and Wisconsin.
 - Provides affordable financing and real estate resources to nonprofit agencies serving low-income communities:
 - 789 loans totaling \$278 million
 - Real estate consulting and development: 325 projects and 1.6 million square feet developed
 - Has deep experience with charter schools:
 - 78 loans totaling \$42 million, creating more than 17,900 new student slots
 - Credit enhancement grants totaling \$10.7 million
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Tell Me About Your Facilities Experience

- How many of you have undertaken or are undergoing a facilities project?
- How many are considering one?
- What do you think is the biggest challenge in undertaking a facilities project?
- What is the one thing you would like to get out of this workshop?

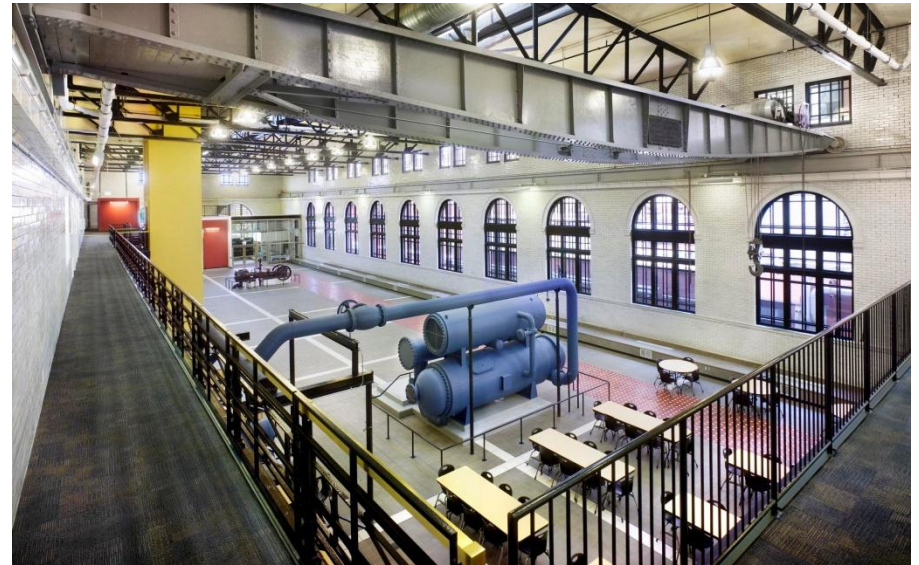
Case Study

Charles H. Shaw Technology and Learning Center, Chicago

Before



After



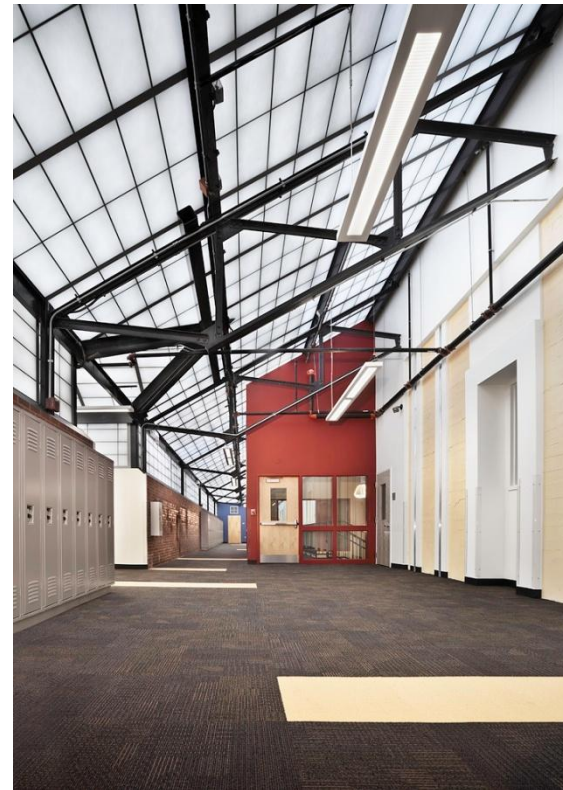
Case Study cont.

Charles H. Shaw Technology and Learning Center, Chicago

Before



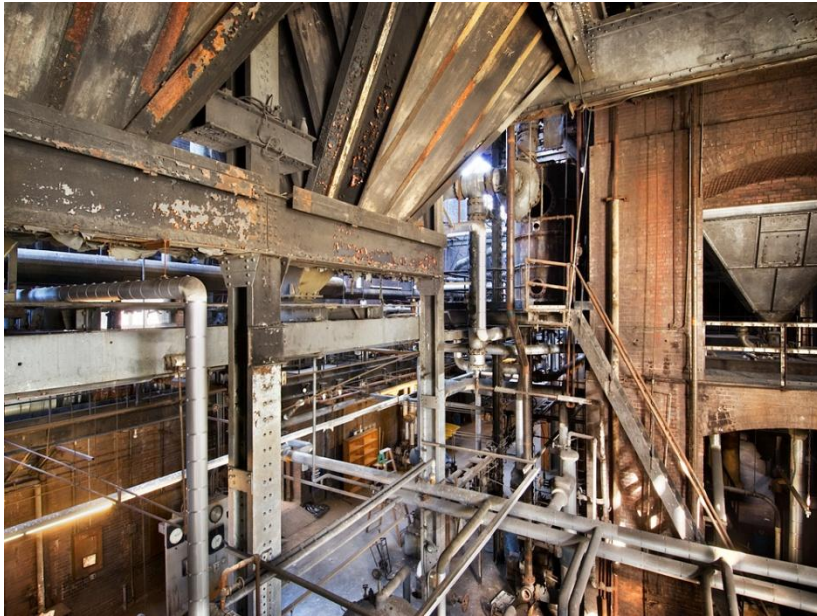
After



Case Study cont.

Charles H. Shaw Technology and Learning Center, Chicago

Before



After



Case Study

Charles H. Shaw Technology and Learning Center, Chicago

- Total Costs: \$40 million
- Square Feet: 95,000
- Students Served: 450
- Opened: August 2009



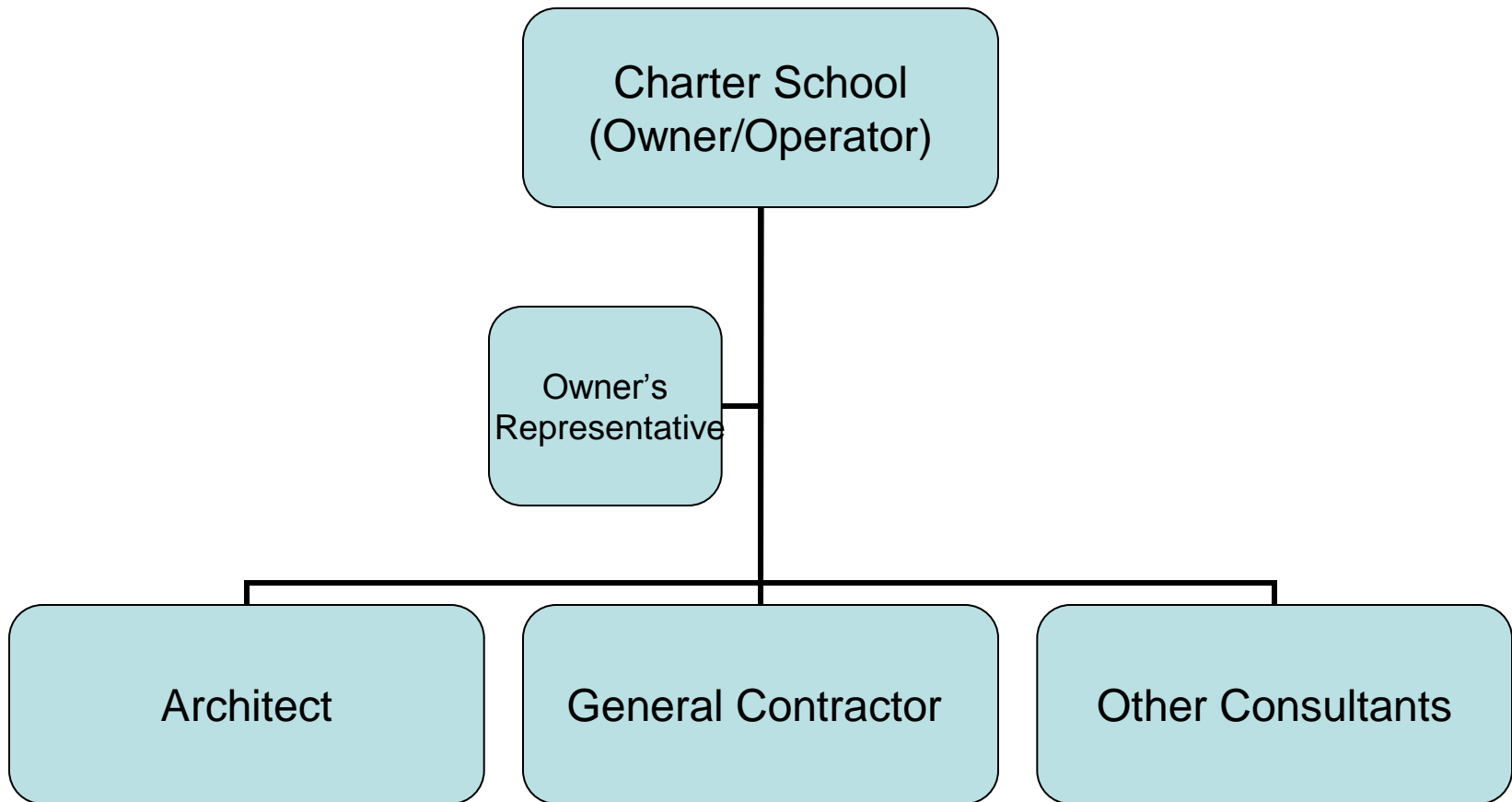
Case Study

Noble Network of Charter Schools Rowe-Clark Math and Science Academy, Chicago

- Total Costs: \$8.7 million
- Square Feet: 42,000
- Students Served: 530
- Opened: August 2007



Overview of Team



Roles and Responsibilities

➤ Charter School (Owner/Operator)

- Provides input on and approves program and design.
- Approves project budget and secures financing.
- Provides necessary approvals.
- Coordinates owner items during construction (IT, security, phone system).

Roles and Responsibilities

➤ Owner's Representative

- Serves as school's "eyes and ears" & advocate.
- Manages design and construction team.
- Assists school with securing financing.
- Provides technical guidance and advice to the school.
- Conducts troubleshooting.
- Monitors project budget, schedule, and quality.

Roles and Responsibilities

➤ Architect

- Designs building and layout reflective of school's needs.
- Designs to a budget.
- Prepares design and construction documents.
- Assists with permitting and zoning.
- Monitors adherence to design and oversees punch list.

Roles and Responsibilities

➤ General Contractor

- Provides on-site management of entire construction process.
- Performs work and/or hires and oversees subcontractors.

Roles and Responsibilities

➤ Other Consultants

- Environmental consultant
- Leadership in Energy and Environmental Design (LEED) accredited professional
- Commissioning agent

How to Hire the “A-Team”

- Ensure that they have relevant experience:
 - Experience with schools and nonprofits
 - Similar project type, size, scale and geography
 - Conduct in-person interviews.
 - Meet the staff who will work on your project
 - Call references and tour existing sites.
 - Examine current workload and capacity.
 - Check insurance, bonding capacity, pending lawsuits, liens, and other information.
 - Have a good contract between school and team members. (Use an attorney.)
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It All Starts With Good Design

- Facility parameters/space needs
 - Number and type of rooms, amenities, green design goals (integrated design process), location.
 - Get input from key staff
- Progression of drawings
 - Schematic drawings (basic floor layout)
 - Design development
 - Construction drawings
- Review and sign-off on each set of drawings
 - Obtain cost estimates as drawings progress

Sample Space Needs

Classrooms	Class-rooms	Students Per Class	SF Per Student	Total SF Per Room	Total SF
Classrooms	14	25	35	875	12,250
Science Lab	4	25	25	625	2,500
Fitness Room	1	25	30	750	750
Music Room	1	25	30	750	750
CLASSROOM SPACE	20				16,250
Administration		Rooms	Employees	Total SF Per Room	Total SF
Reception Area/Main Entrance		1	1	450	450
Administrative Space		1	8	750	750
ADMINISTRATION SUBTOTAL		2	9		1,200
Additional Program Space			Rooms	SF per Room	Total SF
Cafeteria/Recreational Space			1	2,700	2,700
Warming Kitchen			1	500	500
Boys and Girls Showers			2	600	1,200
Storage			1	100	100
Toilet Rooms			4	300	1,200
Work Room			1	100	100
Teacher Prep Area			1	250	250
Janitor's Closet			1	50	50
Maintenance/Utility			1	150	150
I/T Server Room			1	80	80
ADDITIONAL PROGRAM SPACE SUBTOTAL			14		6,330
Circulation			25%		5,945
GRAND TOTAL					29,725

Sample Schematic Drawings



Select General Contractor and Contract Type

- Determine bidding process and contract type.
 - Use competitive bidding or choose a general contractor early on (or could be a combination).
- Prepare bid form.
 - Adhere to project goals (schedule, hiring requirements).
 - Require detailed cost breakdown, unit costs, fees.
- Evaluate bids carefully.
 - Lowest bid is not always the best bid.
 - Conduct “apples-to-apples” comparison.
 - Pricing usually good for 90 days at most.

Financing and Construction Escrow

- Have letters of commitment from all funders.
- Understand funder's requirements for closing:
 - Permit, construction documents, contracts, bids
- Close on financing before construction starts.
- Always have project contingency.
- Establish payout process.
 - Create escrow account with title company.
 - Ensure a process for review of applications for payment, including lien waivers and other documentation.
 - Retain percentage of contractor's fee until completion.

The Expected (and Unexpected) During Construction

- Monitoring construction and schedule
 - Daily field reports prepared by general contractor
 - On-site construction meetings (usually weekly)
 - Pay application meetings (usually monthly)
- Change orders and scope changes
 - Often due to unforeseen site conditions, mistakes in documents, and/or misinterpretation of drawings.
 - Due to owner-initiated changes
 - Carefully review and negotiate pricing.
 - Understand impact on schedule.

Project Closeout

- Substantial completion / occupancy
 - Specify date in general contractor (GC) contract (may not be the same as project completion)
 - Allow 1 to 2 months for move in after Certificate of Occupancy (C of O).
 - Make sure GC schedules all necessary inspections.
 - Obtain necessary business licenses.
- Punch list
 - Comprehensive final inspection with architect and owner's representative.
 - GC's retained fee can be used as leverage if needed.

Project Closeout

- Obtain as-built drawings.
- Obtain warranties, guarantees, manuals.
- Conduct equipment and systems training.
- Ensure that all punch list items are complete.
- Make final payments to vendors and close out escrow.

Q & A

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